

Agency Documentation

Form #	Revision Date	Form Name	Contractor's Equivalent Allowed	Updates
Client File Forms				
43	To be revised	Energy Intake Form	Yes	Appeal
44	To be revised	Energy Intake Form (Spanish)	Yes	Appeal
75P	To be revised	Multi-Family Dwelling Unit Eligibility Certification	Yes	Materials
320		Notice of Weatherization/Renovation	Yes	
321	To be revised	Lead-Safe Education Confirmation of Receipt	Yes	Client ed, budget
322	4/00	Record of Tenant Notification Procedures	Yes	
515	10/99	Energy Service Agreement for Rental Units	Yes	
515D	To be revised	DOE Service Agreement for Unoccupied Multi-Unit Buildings	Yes	Title
540	To be revised	Weatherization Building Assessment & Job Order Sheet	Yes	Measures
600		Statement of Citizenship, Alienage & Immigration Status		
611	To be revised	Contractor Post-Weatherization Inspection Report	No	
BDDS	To be revised	Blower Door Weatherization Data Sheet	No	RHA
CASIF	1/15/03	Combustion Appliance Safety Inspection Form	No	
HCWP	8/22/02	CSD Hazardous Correction Work Plan	No	
	12/16/02	CSD Weatherization Deferral Form	No	
Other Client File Documentation				
Building permits or permit applications				
Energy education, budget counseling documentation				
Income eligibility				
Referral to weatherization program				
Rental agreement				
Source documentation of wx measures installed with other wx program funds				
Source documentation substantiating all appliance replacement and nonfeasibility of mandatory measures not installed/performed				
Source documentation substantiating all costs for labor and materials				
Source documentation substantiating ECIP Fast Track supplemental payment				
Source documentation substantiating ECIP HCS services				
Source documentation substantiating mileage				
Source documentation verifying compliance with Title 24 (HERS rater)				
Utility/energy bills				
Waivers to exceed maximum reimbursements				
Other Forms				
509	1/96	Request for Amendment/Modification-Energy	No	
523	4/05	DOE Annual Leveraging Report	No	
524	4/05	DOE Annual Training & Technical Assistance Report	No	
537E	12/05	2006 LIHEAP Assurance 16/Intake/ECIP/HEAP Budget	No	
557D	12/05	2006 LIHEAP Weatherization Budget	No	
558	3/98	Request for Purchase/Lease Approval	No	
570	To be revised	2006 DOE Weatherization Budget	No	
571	To be revised	2006 DOE Monthly Weatherization Expenditure/Activity Report	No	
574	3/98	DOE Application for Additional Administration Funds	No	

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670	12/05	2006 LIHEAP Monthly Assurance 16/ECIP/HEAP Expenditure/Activity Report	No	
680	12/05	2006 LHEAP Monthly Weatherization Expenditure/Activity Report	No	
ICT	11/8/04	CSD Inspection Correction Transmittal	No	
	New 12/05	Monozor Calibration Log	No	
	New 12/05	Weatherization Training Log	No	

Forms and Client Documentation List

Form #	Revision Date	Form Name	Contractor's Equivalent Allowed	Cash Assistance	WX	ECIP HCS
Client File Forms						
43	1/9/06 New revision	Energy Intake Form	Yes	X	X	X
43	12/05 To be revised	Energy Intake Form (Spanish)	Yes	X	X	X
75P	1/2/06 New revision	Multi-Family Dwelling Unit Eligibility Certification	Yes		X	
321	1/8/06 New revision	Client Education Confirmation of Receipt	Yes	X	X	X
322	4/00	Record of Tenant Notification Procedures	Yes		X	
515	10/99	Energy Service Agreement for Rental Units	Yes		X	
515D	1/8/06 New revision	Service Agreement for Unoccupied Multi-Unit Buildings	Yes		X	
540	1/04 To be revised for 2006	Weatherization Building Assessment & Job Order Sheet	Yes		X	
581	06/02	Weatherization Inspection Report (WIR - RHA)	No		X	X
600	06/01	Statement of Citizenship, Alienage & Immigration Status (public agencies only)	No	X	X	X
611	1/2/06 New revision	Contractor Post-Weatherization Inspection Report	No		X	
BDDS	9/12/05 New revision	Blower Door and Duct Blaster Data Sheet	No		X	X
CASIF	1/15/03	Combustion Appliance Safety Inspection Form	No		X	X
HCWP	8/22/02	CSD Hazardous Correction Work Plan	No		X	X
	12/16/02	CSD Weatherization Deferral Form	No		X	X
Other Client File Documentation						
Building permits or permit applications					X	X
Income eligibility				X	X	X
NEAT Energy Audit printout (DOE only)					X	
Referral to weatherization program						X
Rental agreement (when utilities are included in rent)				X	X	X
Source documentation of wx measures installed with other wx program funds					X	X
Source documentation substantiating all appliance replacement and nonfeasibility of mandatory measures not installed/performed					X	X
Source documentation substantiating all costs for labor and materials					X	X
Source documentation substantiating ECIP Fast Track supplemental payment				X		
Source documentation substantiating ECIP HCS services						X
Source documentation substantiating mileage					X	X
Source documentation verifying compliance with Title 24 (HERS rater)					X	X

Forms and Client Documentation List

Form #	Revision Date	Form Name	Contractor's Equivalent Allowed	Cash Assistance	WX	ECIP HCS
Utility/energy bills				X	X	X
Waivers to exceed maximum reimbursements					X	X

Reporting Forms						
523	4/05	DOE Annual Leveraging Report				
524	4/05	DOE Annual Training & Technical Assistance Report				
537E	12/05 New revision	2006 LIHEAP Assurance 16/Intake/ECIP/HEAP Budget				
557D	12/05 New revision	2006 LIHEAP Weatherization Budget				
570	To be revised for 2006	2006 DOE Weatherization Budget				
571	To be revised for 2006	2006 DOE Monthly Weatherization Reimbursement/Activity Report				
670	To be revised for 2006	2006 LIHEAP Monthly Assurance 16/ECIP/HEAP Reimbursement/Activity Report				
680	12/29/05 Draft	2006 LHEAP Monthly Weatherization Reimbursement/Activity Report				
Other Forms						
50	12/03	CLASS Death Match File Override Request Form	Yes	X		
320	04/00	Notice of Weatherization/Renovation	Yes		X	
491	02/03	Consultant Travel Expense Claim	No			
509	1/8/06 New revision	Request for Amendment/Modification-Energy	No	X	X	X
558	3/98	Request for Purchase/Lease Approval	No	X	X	X
574	3/98	DOE Application for Additional Administration Funds	No		X	
784	1/8/06 New form	Weatherization Training Log	No		X	X
785	1/8/06 New form	CO Analyzer Calibration Log	No		X	X
G-865	1/31/05	Department of Homeland Security Document Verification Request	No	X	X	X
G-865S	1/31/05	Department of Homeland Security Document Verification Request Supplement	No	X	X	X
I-130	10/26/05	Department of Homeland Security Petition for Alien Relative	No	X	X	X
ICT	11/8/04	CSD Inspection Correction Transmittal	No		X	X

ALL CONTRACTOR EQUIVALENT FORMS MUST BE PRE-APPROVED BY CSD.